



a network of Kingdom building services

VISION | ARCHITECTURE | ENGINEERING | CONSTRUCTION | FUNDING SOLUTIONS | SUPPLY

May 25, 2010

Dear Friend in Christ,

We're so pleased you've requested BGW | Financial free Funding Solutions Analysis (FSA). We offer comprehensive funding solutions analysis for Christian ministries nationwide. The analysis provided is intended to help you make wise decisions on how to fund God's vision for your project.

There are four aspects to our services:

- Consultative – helping you decide at each stage whether you can fund your project
- Comprehensive – taking into consideration all essential information
- Creative – helping you overcome obstacles to fund your project with fresh perspective
- Coordinated – funding consultation synced with your architect, builder and capital campaign

In order to provide you with this comprehensive funding assessment, please completely fill out our questionnaire.

You'll also need to provide a copy of your financial statements for the past three years along with your financial statements for the current fiscal year through the most recent full month. This documentation should include both income statements and balance sheets.

**Please do not leave any questions blank.** If the question does not apply to you, put Not Applicable (N/A), or provide additional information explaining why you cannot provide the information. Incomplete information may delay complete of your Funding Solutions Analysis (FSA).

Thank you for your interest in the services provided by BGW | Financial. If you have any questions, please contact me by email at [dsims@bgwservices.com](mailto:dsims@bgwservices.com) or phone, 501-442-3585. I'm looking forward to helping you discern God's vision for your project and how He wants to fund it through your prayerfully wise, faith-filled decisions.

Many blessings in Christ,

David Sims, President  
BGW | Financial  
*part of the BGW Services network*

BGW | FINANCIAL | 2909 Washington Boulevard  
| Ogden, UT 84401 | P: 800.552.7137 | F: 801.622.8812

  
[www.BGWSERVICES.com](http://www.BGWSERVICES.com)

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BALTIMORE | CINCINNATI | COEUR D'ALENE | DALLAS | INDIANAPOLIS | OGDEN | OKLAHOMA CITY | ORLANDO | SALT LAKE

**BGW | FINANCIAL**  
**FINANCIAL ANALYSIS QUESTIONNAIRE**

**Contact Person:**

Position: \_\_\_\_\_  
 Contact Phone: \_\_\_\_\_  
 Contact Fax: \_\_\_\_\_  
 Contact Email: \_\_\_\_\_

**Organization Name:**

Address: \_\_\_\_\_  
 City, County, State, Zip: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Fax: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Website: \_\_\_\_\_  
 Fed Tax ID # \_\_\_\_\_  
 Date organization formed: \_\_\_\_\_  
 Date organization incorporated: \_\_\_\_\_  
 Senior Pastor/Principal: \_\_\_\_\_  
 Years Pastor/Principal served: \_\_\_\_\_  
 Denomination: \_\_\_\_\_  
 Loan Amount Requested:       \$ \_\_\_\_\_  
 Purpose of Loan: \_\_\_\_\_  
 \_\_\_\_\_

**Ministry Size:**

	Attendance (church only)	Membership or Student Size	Family Giving Units
2007:	_____	_____	_____
2008:	_____	_____	_____
2009:	_____	_____	_____
2010:	_____	_____	_____

**Church:**

Do you operate a school? \_\_\_\_\_  
 Grades: \_\_\_\_\_  
 Last full year school receipts:       \$ \_\_\_\_\_  
 Last full year school expenses:       \$ \_\_\_\_\_

**School:**

Are you a church sponsored school? \_\_\_\_\_  
 If yes, name of sponsoring church: \_\_\_\_\_  
 Annual budget of sponsoring church: \_\_\_\_\_  
 Percentage of students from sponsoring church: \_\_\_\_\_

Number of other congregations represented: \_\_\_\_\_  
 Congregations with more than 5 families represented: \$ \_\_\_\_\_  
 Annual income from Foundations/Grants: \$ \_\_\_\_\_  
 Annual income from fundraising/events: \$ \_\_\_\_\_  
 Annual income from individuals: \$ \_\_\_\_\_

**Income / Expenses:**

	2007	2008	2009	YTD 2010
Receipts (all funds):	\$ _____	\$ _____	\$ _____	\$ _____
Expenses (all funds):	\$ _____	\$ _____	\$ _____	\$ _____
Receipts over (under) expenses:	\$ _____	\$ _____	\$ _____	\$ _____
Building Fund Receipts:	\$ _____	\$ _____	\$ _____	\$ _____
Building Fund Expenses:	\$ _____	\$ _____	\$ _____	\$ _____
Amount of all existing mortgage debt today:	\$ _____			
Monthly payments on existing mortgage debt:	\$ _____			
Interest rate on existing mortgage debt:	_____	%		
Amount of existing debt to be refinanced:	\$ _____			

**Collateral:**

Value of all real estate owned: \$ \_\_\_\_\_  
 Estimated/Actual (circle one) appraisal date: \_\_\_\_\_  
 Description of Property (acres/sq feet) \_\_\_\_\_  
 Other collateral:  
 Amount of property for sale: \$ \_\_\_\_\_  
 Building fund cash on hand: \$ \_\_\_\_\_  
 Total Cash on Hand \$ \_\_\_\_\_  
 Other: \_\_\_\_\_  
 Total Collateral: \_\_\_\_\_

**Construction Information:**

Property Address: \$ \_\_\_\_\_  
 Land Purchase Price: \$ \_\_\_\_\_  
 Description of Property (acres/sq feet): \_\_\_\_\_  
 Cost of Property: \$ \_\_\_\_\_  
 Total Construction Cost: \$ \_\_\_\_\_  
 Amount Already Spent: \$ \_\_\_\_\_  
 Have Permits Been Pulled? \_\_\_\_\_  
 Do you have a Fixed Price Contract? \_\_\_\_\_  
 What do you estimate the completed value to be? \$ \_\_\_\_\_

**Pledge Drive History:**

Current pledge drive began (month and year): \_\_\_\_\_  
 Amount pledged: \$ \_\_\_\_\_

Term of pledges (number of months):

Amount collected to date:

Firm used (or internal):

Next pledge drive planned for (date):

Past pledge drive information (date/amt pledged & received)

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*This questionnaire was prepared by:*

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_ Date: \_\_\_\_\_

**PLEASE BE SURE TO INCLUDE the following:**

- **Income & Expenses (Profit & Loss) – last 3 fiscal years and current year to date**
- **Balance Sheets (Assets & Liabilities) – last 3 fiscal years and current year to date**
- **Resume on Senior Pastor/School Principal & History of Church/School**
- **Statement of Faith**
- **Any and all pertinent documents or information regarding your project that you deem important for us to consider in preparing our Funding Solutions Analysis (FSA)**

**PREFERABLY, PLEASE SCAN AND E-MAIL THIS COMPLETED FORM AND ALL REQUESTED INFORMATION TO:**

David Sims, President @ [dsims@bgwservices.com](mailto:dsims@bgwservices.com)  
P: 501.442.3585

and **Scott Griffin:** [sgriffin@bgwservices.com](mailto:sgriffin@bgwservices.com)  
P: 800-552-7137 ext. 1047

**IF YOU ARE UNABLE TO SCAN AND E-EMAIL THE DOCUMENTS, PLEASE FAX TO:**

**BGW | Financial**  
ATTN: David A. Sims, President, and Scott Griffin  
F: 801-622-8812

**IF YOU ARE UNABLE TO SCAN/E-EMAIL OR FAX, THEN PLEASE MAIL TO:**

David Sims, President  
**BGW | Financial**  
8 Pleasant Court  
Little Rock, AR 72211

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T: 800-552-7137  
F: 801-622-8812  
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